

Cheat Sheet on the IEP Process

This is a quick outline of the steps of the IEP Process, from the Meeting Notice to the follow-up on the PWN. For more complete technical information, please refer to the [SpEd Forms Support Website](#). For more complete information on policy and procedure, please refer to the [Due Process Notebook](#).

Because staff are new to SpEd Forms, it is important to double-check to make sure previous documents were finalized before moving forward with creating the new document.

Planning and Documenting the IEP Meeting

- ☐ Double-check to make sure both the Meeting Notice and the Record of Team Meeting have been finalized as a FINAL.
- ☐ Complete and finalize the Meeting Notice as a FINAL document.
- ☐ Go to the Record of Team Meeting and delete the notes from the previous meeting.
- ☐ Print the Record of Team Meeting to be used as a sign-in sheet.
- ☐ Have attendees sign the sign-in sheet.
- ☐ Record your meeting notes in the Record of Team Meeting document and finalize that as a FINAL document.
- ☐ Upload the sign-in sheet to the student's History. Be sure to use the drop-down menu to title the document "Signed Record of Team Meeting"

Completing the IEP

- ☐ Double-check to make sure that the previous IEP was finalized as a FINAL before you overwrite information in the working space.
- ☐ Work your way through each page, double-checking each cell to make sure it is correct.
- ☐ Connect with any service providers to make sure that they have added their information to the IEP.
- ☐ Finalize the IEP as a FINAL document.

Completing the PWN

- ☐ Double-check to make sure that the previous PWN was finalized as a FINAL before you overwrite information in the working space.
- ☐ Work your way through the PWN questions, double-checking each cell to make sure it is correct.
- ☐ Finalize the PWN as a FINAL document.
- ☐ Send both the IEP and the PWN to the guardians for review and signature.

Following up on an IEP/PWN

- ☐ If you do receive a signed PWN back, upload that PWN (all pages - to make it obvious what the parents signed) to the history, making sure to use the drop-down to title the upload "Signed Prior Written Notice".
- ☐ If you do receive a signed PWN back, go to the Finalized IEP and change the comment to say "IEP finalized by signature received on <date>"
- ☐ If you do not receive a signed PWN back on a continuing IEP, go to the Finalized IEP and change the comment to say "IEP finalized by default on <date>"
- ☐ If you receive a parent refusal on a continuing IEP, or you don't receive the PWN back for an initial IEP, talk with your lead teacher or supervisor regarding next steps.